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# REPORT

United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

8 '84

WR 50-83

WASHINGTON, Dec. 14--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

## GRAIN AND FEED

POLISH sources indicate an outlook for larger 1983/84 corn imports as plans to revive Poland's broiler industry are given priority in the country's agricultural plan. Consequently, Polish corn imports for 1983/84 (July-June) are expected to increase 30 percent above last year to approximately 700,000 tons. Nearly all of the corn would be expected to come from the United States.

In 1982/83, Polish corn imports dropped to 550,000 tons--the lowest level in a decade--due to the loss of both U.S. credit guarantees and concessional sales, and a shortage of hard currency for cash purchases. Poland's imports remain constrained by the availability of financing and hard currency shortages. While no U.S. credit guarantees or concessional sales for Poland are scheduled this year, increased rye exports from the record 1983 Polish crop could provide a source of hard currency for larger 1983/84 cash corn purchases.

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Contrary to earlier expectations that the EUROPEAN COMMUNITY (EC) had abandoned the idea of a special subsidy to move bread wheat from intervention stocks to feed, and despite budgetary constraints, the Community has now approved a plan to sell 2 million tons of bread wheat into animal feed by the end of February. Sales would be by tender at a minimum price of about 205 ECU's per ton (\$173), which would be about 4 percent below the prevailing support price. Although the Community is expected to save about 5 million ECU's per month in storage costs, the wheat sales from the intervention stocks could have an additional price depressing effect on local markets and heighten the pressure to export wheat being displaced from the domestic market.

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## OILSEEDS AND PRODUCTS

In the first 10 months of 1983, Poland purchased \$153 million of bulk grain and oilseeds, all of which were of U.S. origin, according to the U.S. agricultural attache in Warsaw. Poland is estimated to have purchased 190,000 tons of soybeans and 195,000 tons of soybean meal for shipment mainly in 1983, with some in 1984. Poland's total imports of soybeans are estimated at 180,000 tons in 1983 and 175,000 tons in 1984, indicating the United States is Poland's predominant supplier of soybeans. Poland's soybean meal imports have declined substantially in recent years, but are expected to partially recover to 375,000 tons in 1984, with the United States in a position to supply a significant part of Poland's import requirements.

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FISHMEAL EXPORTERS ORGANIZATION (FEO) COUNTRIES, which account for the bulk of world fishmeal supplies traded in world markets, registered cumulative declines with January-September 1983 production at 964,000 tons, down 27 percent from the same nine months in 1982. Fishmeal exports during the same period dipped to 855,000 tons, down 20 percent from the same period a year ago. Fishmeal stocks on Sept. 30, 1983, at 298,000 tons, were down by one half from a year earlier. Data are as follows in 1,000 tons:

Country	-----Jan-Sep 1982-----			-----Jan-Sep 1983-----		
	Production	Exports	Ending Stocks	Production	Exports	Ending Stocks
Chile	564	432	327	515	481	170
Iceland	40	46	18	37	34	3
Norway	237	156	95	280	203	84
Peru	483	435	158	132	137	41
Total	1,324	1,069	598	964	855	298

During September 1983, fishmeal exports by the FEO countries, at 151,000 tons, substantially exceeded production and were 18 percent above the same month a year ago. However fishmeal production in September, at 96,000 tons, registered a 30-percent decline from the September 1982 volume. Combined fishmeal stocks in the FEO countries declined by 60,000 tons during September 1983.

In early December, fishmeal prices, basis Europe, were about \$467 per ton—17 percent above the same month a year ago. Despite the decline in FEO fishmeal production, exports and stocks, the fishmeal/soybean meal price ratio remains about unchanged from a year ago at 1.68 to 1.

## COTTON AND FIBERS

EGYPT has announced higher opening export prices for 1983/84 crop cotton sales. Quotations for important Giza 70 and Giza 75 varieties were \$1.40 and \$1.14 per pound, f.o.b., respectively, increases of 7 and 24 cents per pound over last season's opening level. Egyptian cotton exports during the 1983/84 season are forecast at 850,000 bales, 480-pound basis.

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## COFFEE, TEA AND COCOA

WORLD green coffee production for 1983/84 is estimated at 91.7 million bags (60 kilograms each), 9.3 million bags or 11 percent above the 1982/83 output of 82.3 million. Increased production in Brazil more than offset decreases in many coffee producing countries. South American production will be one third larger than a year ago, bolstered by increases in the crops of Brazil, Peru and Venezuela. The Brazilian crop, now estimated at 30 million bags, is nearly twice as large as last year's frost-reduced output. However, the quality of Brazil's 1983/84 crop was significantly lowered by persistent heavy rain during May and June. The excessive moisture occurring during the harvest stage caused fermentation of sugars in the pulp of ripe coffee cherries, which adversely affected the flavor or cup quality.

Colombian coffee production will be off only 2 percent from last year's level despite an outbreak of coffee rust. The rust did not reduce the quality or quantity of the main crop harvest, which is now nearing completion. Production of coffee in Ecuador fell 25 percent below the previous year's crop because of unseasonably heavy rains during October 1982-August 1983 associated with the "El Nino" current.

In North and Central America and the Caribbean, coffee production will be less than a year ago in all major countries except Mexico, which will harvest a slightly larger crop than last year. The quality of Mexican coffee is expected to be better than the 1982/83 crop, which matured earlier than normal. In Costa Rica, the crop is expected to total a near normal 2.1 million bags, though down 16 percent from the record level of last year. In Honduras, where coffee yields are being suppressed by rust on 20 percent of the planted area, production will be down by more than 400,000 bags. In El Salvador, yields are expected to be lower than last year because of cool weather during the flowering period in March and an extended dry period in July. In addition, lower coffee prices made increased use of fertilizers and insecticides less attractive.

African coffee production for 1983/84 will be down 2 percent as a result of large decreases in the Ivory Coast and the Central African Republic that were not offset by increases in other countries. In the Ivory Coast, coffee production will decline by nearly 600,000 bags as irregular rainfall resulted in poor yields. This also is the "off" year in the alternate bearing production cycle. Drought in the Central African Republic is expected to shorten this year's production to 120,000 bags, 61 percent below last year's crop. In Asia and Oceania, only a slight decline is expected mostly due to reduced prospects in India. The early monsoon withdrawal gave a prolonged dry spell from October 1982 through April 1983 and caused defoliation problems of coffee trees in India.

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Production by regions and for selected countries is estimated as follows in 1,000 60-kilogram bags:

Region/Country	1982/83	1983/84
North and Central America and Caribbean:		
Costa Rica	2,450	2,070
Dominican Republic	1,100	800
El Salvador	2,671	2,453
Guatemala	2,593	2,340
Honduras	1,756	1,350
Mexico	4,100	4,200
Nicaragua	1,188	910
Others	1,531	1,382
Total	17,389	15,505
South America:		
Brazil	17,750	30,000
Colombia	13,300	13,000
Ecuador	1,835	1,381
Peru	1,100	1,200
Others	1,390	1,565
Total	35,375	47,146
Africa:		
Cameroon	1,817	1,900
Ethiopia	3,350	3,350
Ivory Coast	4,260	3,667
Kenya	1,548	1,510
Uganda	3,200	3,100
Zaire	1,390	1,400
Others	4,574	4,769
Total	20,139	19,696
Asia and Oceania:		
India	2,200	2,000
Indonesia	4,786	4,895
Philippines	960	912
Papua New Guinea	890	920
Others	606	583
Total	9,442	9,310
World Total	82,345	91,657

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The 1983/84 cocoa bean main crop in WEST AFRICAN countries has been subject to near drought conditions for most of the season. In the Ivory Coast, the main crop has been seriously affected by lack of rainfall. Wide-spread rains have fallen in most of the cocoa area since December 1. Crop quality is of major concern because of the small and overripe beans. This year's harvest is later than normal and many producers, in an effort to cut harvest costs, are limiting the number of pickings. Cross-border movement from Ghana to the Ivory Coast this season could reach 40,000 tons.

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In Cameroon, a disappointing pod set coupled with the effects of dry weather caused lower production estimates from October and a year ago. In Ghana and Nigeria, brush fires and a severe Harmattan (a seasonal dry wind) a year ago damaged trees, lowering production prospects. Ghana's producers are shifting to food crops and are facing serious transportation problems in getting cocoa to ports.

The new USDA forecasts for these countries along with the estimate made in October 1983 are as follows in 1,000 tons:

COCOA BEANS: PRODUCTION IN SELECTED COUNTRIES 1/

	October 1983 2/ Forecast	December 1983 Revised Forecast
Cameroon	117.0	100.0
Ghana	160.0	145.0
Ivory Coast 3/	400.0	390.0
Nigeria	170.0	155.0

1/ Estimates refer to an October-September crop year. 2/ Weekly Roundup 41-83. 3/ Includes cocoa marketed from Ghana.

FRUITS AND NUTS

The U.S. agricultural counselor in Madrid estimates SPAIN's 1983 tomato for processing crop at 526,000 tons, up 17 percent from the July estimate (see WR 27-83), but down 7 percent from last year's harvest. Despite the continuation of the three-year drought, the early season production forecast proved to be overly pessimistic, as irrigation water supplies were low but adequate. Area was down, however, and drought in Estremadura (the leading tomato paste producing area) and low temperatures and hailstorms in northern producing regions combined to reduce yields slightly. Production costs for this year's crop were up about 8 percent, while grower prices were up from 30 to 50 percent.

Selected International Prices

Item		: Dec. 13, 1983	: Change from : previous week	: A year ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%11/	198.00	5.39	+3.00	202.50
U.S. No. 2 DNS/NS: 14%.12/	190.00	5.17	+7.50	184.00
U.S. No. 2 S.R.W.11/.....	157.00	4.27	-1.50	157.00
U.S. No. 3 H.A.D.12/.....	208.00	5.66	+10.00	174.00
Canadian No. 1 A: Durum.11/	213.00	5.80	+5.00	200.00
Feed grains:				
U.S. No. 3 Yellow Corn....	152.00	3.86	-3.00	118.00
Soybeans and meal:				
U.S. No. 2 Yellow.....	309.25	8.42	+8.25	232.75
Brazil 47/48% SoyaPellets 2/	287.00	--	+9.00	230.00
U.S. 44% Soybean Meal.....	254.00	--	+1.50	216.00
U.S. FARM PRICES 3/				
Wheat.....	127.87	3.48	.73	126.77
Barley.....	84.97	1.85	+2.76	62.47
Corn.....	123.22	3.13	-1.18	87.00
Sorghum.....	110.45	5.01 4/	+2.22	88.18
Broilers 5/.....	1235.02	--	-.66	N.A.
EC IMPORT LEVIES				
Wheat 6/.....	71.75	1.95	-.65	105.85
Barley.....	49.90	1.09	+.65	98.85
Corn.....	46.60	1.18	+.75	101.90
Sorghum.....	58.35	1.48	+.20	91.40
Broilers 7/.....	198.00	--	-2.00 8/	298.00
EC INTERVENTION PRICES 10/				
Common wheat(feed quality)	167.60	4.56	+1.80	179.35
Bread wheat (min. quality)	183.35	4.99	+1.65	197.60
Barley and all				
other feed grains.....	167.60	--	+1.80	179.35
Broilers 9/.....	1131.00	--	0	1133.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat 10/.....	39.70	1.08	-1.70	72.75
Barley.....	29.30	.64	+.95	72.50
Broilers 7/.....	164.00	--	-2.00 10/	192.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine. 3/ Based on selected major markets and adjusted to reflect farm prices more closely. 4/ Hundredweight (CWT). 5/ Twelve-city average, wholesale weighted average. 6/ Durum has a special levy. 7/ EC category—70 percent whole chicken. 8/ Reflects lower EC export subsidy-down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 9/ F.o.b. price for R.T.C. broilers at West German border. 10/ Corrective amount in ECU's: Dec. zero, Jan. -3, Feb. -5, Mar. -6. 11/ April-May shipment. 12/ Jan/Feb/Mar shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis January delivery.

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